

Understanding, Developing, and Facilitating

Educational Role Play

What is role play, and what is it useful for?

Role play provides opportunities for participants either to play themselves within a simulated context or to step into or “play” a role other than themselves. For our purposes—that of educating future principals—it is desirable that the role into which a participant steps is a) one which he or she currently inhabits or will inhabit and/or b) one with whom the participant is likely to work with as a future principal. The first allows the participant/learner the greatest possible freedom to act as him or herself within the constraints of the role. The second provides an opportunity to gain an empathic understanding of what motivates those they will encounter and thus to be more effective in working with them.

Role play is especially useful for developing leadership competencies. First, it helps make an experience come alive in the room as a springboard for exploring a dilemma experientially. It allows individuals and a group to explore a range of possible decisions and the outcomes of those decisions. A common dilemma for principals, for example, is wanting to push forward a change initiative that is unpopular among faculty. In the context of a role play, a future principal and a class can explore different strategies for leveraging support or for coming up with good-enough compromises in spite of clashing values. In a role play, participants can receive immediate feedback on the success or lack of success of moves and counter-moves.

Second, role play is useful for practicing skills. A future principal who becomes intimidated, shutting down when others express anger, for example, can, in the context of a role play, practice varying strategies and become increasingly skilled at responding effectively in the face of an angry parent, teacher, etc.

Third, in the spirit and tradition of Paulo Freire and Augusto Boal, role play supports individual and collective empowerment and liberatory teaching and learning. In a role play, there is no clear right or wrong. There are, however, strategies that are more and less effective. Paradoxically, role play provides the structure within which individuals and groups experience and reflect upon the results of their own complex choices, and thus become increasingly confident in making informed, autonomous decisions about what strategies are most effective in what contexts, and where they break down.

Fourth, role play offers participants a chance to inhabit, and to experiment with different ways of inhabiting, a future professional role—in our case, that of principal. In a relatively low-risk educational environment, participants are able to hear, see, and experience themselves as the professionals they are in the process of becoming. A central task for any professional is, over time, to become increasingly comfortable bringing the various aspects of oneself to one’s professional role.

Fifth, the learning that takes place in role play is real and transferable. Experiential learning draws on, cultivates, and raises awareness of embodied knowledge, the “tacit knowing-in-action” (Schön, 1983, p. 49) that professionals use in everyday life. Role play challenges participants to act and respond not only from their intellect, but from a place that is closer to their core—from their emotions and their feelings; it brings the whole human being to play. Doing so can create, within the learner, a new reality and range of possible responses. Acts of visualization and doing carve out new neural and physiological pathways inside the mind and body, so that when the learner is then faced with an actual angry parent, for example, the pathway has been carved, and she is not inventing her response for the very first time.

How do I design a role play?

Designing an effective role play is trickier than it looks. Here are some ideas we have garnered and developed about what effective role plays have in common:

1. *The objective of the role play is clear.* The future principal described above who is afraid of anger knows exactly what skill she needs to practice. Role play should be designed in order to explore a particular dilemma or practice particular skills that the facilitator has determined, based on his or her diagnosis, are needed at that time.
2. *The role play is focused on one core dilemma.* The situation, around which the role play develops is a true dilemma at its core. Larry Cuban distinguishes problems from dilemmas, describing dilemmas as “messy, complicated and conflict-filled situations that require undesirable choices between competing, highly-prized values that cannot be simultaneously or fully satisfied” (2001, p.10). The central tension around which the role play develops captures a distilled version of the complexity of real life. A role play should be focused around a question to which the designer him or herself cannot with certainty provide the answer. This allows for genuine exploration and inquiry.
3. *All aspects of the role play (design, structure, characterizations/roles) are distilled to their essence in order to crystallize the core dilemma.* Design, structure, and characterizations in role plays are distillations—the bare minimum required to create tension such that the learner-in-role has no choice but to act. Even to not act becomes a decision. This distillation, paradoxically, is both different from and the essence of real life. In order to be effective, a practice situation must be distilled enough to offer exploration of a discrete dilemma or practice of a discrete skill, but it must contain enough of the complete situation, in distilled form, to be transferable.
4. *The role play contains external and internal contradictions that require participants to act in order to lessen tension.* The existence of both external and internal contradictions heightens tension. An external contradiction exists when a situation or character impedes another character from getting what he or she most wants. An internal contradiction refers to mutually exclusive internal desires we

have as human beings. As Boal writes, “Hamlet wants only one thing, to avenge his father; but on the other hand, he doesn’t want to kill his uncle” (1992, p. 55). Effective role plays have structures and limits that sharpen fundamental contradictions to such an extent that the central player has no escape. The character’s motivation is to reduce discomfort by selecting one decision, path, or action over another; however the participant in role must choose/act in his or her own way. Character role/sketches provide just enough information to determine what this character most wants. For maximum personal involvement, the person playing the role should provide his or her own back story, including secondary wills or counter-wills, conflicting desires, and the reasons why he or she wants what s/he does.

5. *The role play contains uncertainty and ambiguity.* Real life dilemmas require messy, difficult decisions in the face of conflicting desires and thus call on individuals to clarify what is non-negotiable and what is open to compromise. In an effective role play designed to explore a dilemma, there is genuinely no right answer. Often in an educational role play, unlike in an actual plays, core contradictions are made transparent in the service of learning. Other times, the core dilemma is discoverable, but intentionally hidden. This requires participants to sift through and prioritize information in order to identify the core dilemma for themselves. This challenge is particularly appropriate for future leaders, whose most difficult tasks will require them not to solve pre-defined problems, but to contend with a mass of contradictory or insufficient information and to “*name* the things to which [they] will attend and to *frame* the context in which [they] will attend to them” (Schön, 1983, p. 40).
6. *Successful role plays are often very short.* As soon as the central tension emerges, role plays can be frozen in time in order to allow reflection and/or other participants to step into role and present alternatives. Consider, for example, the deceptive simplicity of the following role play that could be used in this facilitator training. It is a simple form of role play, involving only two roles and minimal information, but it contains the essential elements: a clear objective based on participants’ actual concerns and that they might actually face, a crystallized dilemma with no right answer, an opportunity to learn about the experience of another with whom they will come in contact and thus be able to more effectively serve, and the opportunity for participants to bring their own views, experiences, and back stories to role:

Sample Role Play:

- **Imagined context:** Summer Intensive, The Leadership Academy.
- **Role 1:** A facilitator introduces participants to the morning’s assignment: developing vision statements in small groups.
- **Role 2:** A participant actively resists.
- **Leader of role play says:**
 - i. Go
 - ii. Freeze

- iii. What happened here? Why don't you give it another shot? and/or Who else wants to give Role 1 a try responding in a different way?

Note that the role play is designed to provide just the amount of information that is necessary in order to crystallize a conflict, but no more. We do not specify, for example, what the participant (role 2) is angry about ("My group members are lazy?" "How do I get an A anyway?" etc.) or the specific manner in which s/he resists. These omissions are intentionally designed to allow players the maximum opportunity to bring their own fears, expectations, and imaginations to the scene that is, nonetheless, structured to heighten conflict.

Note as well that even with very few characters, every member of the group will learn from observing and reflecting on the moves and counter-moves of those who inhabit roles.

What questions can I ask myself when designing a role play?

1. What is my objective? What strategies do I want participants to explore and practice?
2. What are the essential elements of context? (Scene, time, plot...)
3. What is the core dilemma in which participants need such strategies?
 - a. How much of the core dilemma will be explicit?
 - b. How much of the core dilemma will be hidden?
4. Who are the players/characters?
 - a. What does each character most want?
 - b. What are his/her conflicting desires?
5. What are the rules of the game?
6. How much information will I provide?
7. How will I provide that information?
8. What information will the people playing roles decide themselves?
9. What will my role as facilitator be?

How do I facilitate a role play?

There are three models of facilitation with regard to role play:

1. *The facilitator is outside the role play.* The facilitator orchestrates the activity in the standard role of facilitator.
2. *The facilitator moves in and out of the role play.* This can refer to moving in and out of character in the context of a planned role-play activity. For instance, a facilitator might decide to play the role of principal in order to model various ways of responding to an angry parent. He or she might step in and out of role in order to debrief the process along the way. Or, moving in-and-out of role play can refer to the moment-to-moment changes that a facilitator makes in the standard work of facilitation/teaching. For example, in a particular moment, a facilitator might decide to "take on a role" outside of his or her standard facilitative stance, deciding to play the devil's advocate, for instance, or to suddenly take on the voice of a

distressed teacher. This model signals to us the aspect of role-play that is embedded in all forms of teaching, yet highlighted at some times more than others. When shifting in and out of role, it is important to signal the shift.

3. *The facilitator plays a character inside the role play activity.* A facilitator might decide for example, that in order to enhance participants' learning, he or she will "play" the role of an angry parent. The facilitator should have a rationale for why his or her taking on that role will enhance learning. Perhaps it is early in the groups' working together, and he or she doesn't feel students are yet ready to play the role with enough anger to simulate a real experience. There may be other reasons as well. Although the facilitator is likely to learn from playing a role, the key distinction between a facilitator-in-role and a participant-in-role is that the facilitator's primary task in role is to enhance participant learning.

Three Suggestions:

Finally, we offer three overall suggestions for enhancing the effectiveness of role play:

1. *Freeze and reflect frequently.* In whatever mode one facilitates, it is important to stop or freeze the role play frequently—to provide many opportunities for reflection and changing direction. Over time, a facilitator hones his or her ability to time and tailor interventions in the service of deepest learning.
2. *Model taking the work seriously.* It is not uncommon for participants to be resistant to experiential learning in general and to role play in particular; after all, this form of learning will be new, uncomfortable and even threatening for many, partially because it embeds within itself a critique of traditional, non-experiential forms of teaching and learning and partially because it challenges participants on a deep level. Resistance often takes the form of not taking the assignment seriously. Facilitators and participants should have fun with role play; a sense of humor, in fact, is a critical ingredient for its success. But at the same time, the most effective way to convey the seriousness of this work is by believing in and modeling its seriousness oneself.
3. *Have faith.* Part of the game is not knowing where it's going to go. Be willing to experiment, mess up, and learn from one another.

References:

1. Boal, A. (1992). *Games for Actors and Non-Actors*. London: Routledge.
2. Cuban, L. (2001). *How Can I Fix It?: Finding solutions and Managing Dilemmas, An Educator's Roadmap*. New York: Teachers College Press.
3. Freire, P. (1971/1996). *Pedagogy of the Oppressed*. New York: Continuum.
Schön, D. A. (1983). *The Reflective Practitioner*. New York: Basic Books.

What to Consider when Designing a Role Play

Sample Role Play Assignment

Purpose: Provide facilitators an opportunity to learn from the development and implementation process of creating a role play.

Task: In teams, assess a situation and identify a core dilemma. Develop a role play that explores this dilemma experientially and allows for inquiry into different strategies for resolving the dilemma.

Audience: For the purposes of this task, your audience will be your fellow Facilitator Training attendees. However, you should develop your role play with the potential of using it with the Aspiring Principals. For this purpose, the role play should align to specific leadership dimensions as defined on the Leadership Performance Matrix.

Expectations

Your role play should contain the following elements and meet the respective expectations:

Element	Expectation
Role Play Activity	<ul style="list-style-type: none">- allows participants to explore a dilemma experientially- allows participants to exploring different choices and decisions
Structure	<ul style="list-style-type: none">- consideration is given to the various structures of a role play
Role Assignments	<ul style="list-style-type: none">- script or description of situation and roles is relevant to participants experience- roles are relevant to dilemma- roles are distilled for the purposes of heightening the dilemma- traits assigned to roles are realistic, relevant, and complex
Time	<ul style="list-style-type: none">- the role play itself is short, but allows for different individuals to participate in the various roles- maximum time for role play is 20 minutes- maximum time for debrief is 30 minutes
Debrief	<ul style="list-style-type: none">- debrief questions lead to reflection on what happened- debrief process supports learning from role play in ways that are transferable- process is differentiated to ensure that learning is relevant to each and all participants
Leadership Performance Matrix	<ul style="list-style-type: none">- aligns to specific dimensions of the performance matrix

In addition, as this assignment is for your own learning, you should think about how you want to gather feedback on the effectiveness of the role play from your audience.